

NBS End User Training: Customer Entry

Student Guide

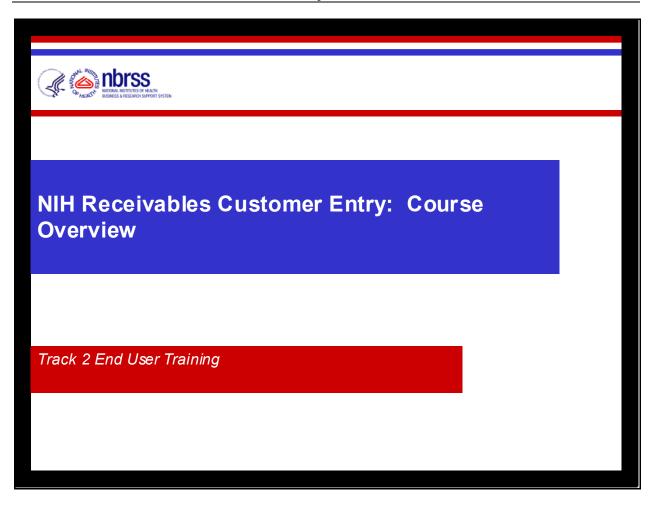
Table of Contents

NIH Receivables Customer Entry: Course Overview	
NIH Receivables Customer Entry: Course Overview	
Course Objectives	
Agenda	
Training Guidelines	
Accessing Oracle via the NIH Portal	
Logging in to the NIH Portal	1-7
Adding a Community to your NIH Portal View	
Questions	1-9
How to Use the Manual	2-1
How to Use the Manual	2-2
Accounts Receivable Overview	3.1
Track 2 Accounts Receivable Overview	2.2
Lesson Objectives	
Accounts Receivable Functionality	
Sponsored In-Cash Travel Activities	
Customer Table	
Sponsored Travel Invoices	
Sponsored Travel Payments	
Accounts Receivable Information Flow	
Lesson Summary	
•	
Maintaining the Customer Table	
Maintaining the Customer Table	
Lesson Objectives	
Roles and Responsibilities	
Option 3: Oracle Extension	
Process Customer Requests	
Accessing the Email Request.	
New Customer Request	
Sample Customer Update Request	
Search NBS for Existing Records	
Find Customers Window	
Query Resulting in No Records Found	
Match Results Window	
Customers-Standard Window	
Customer Addresses Window	
Customer Entry Options	
Entering a New Customer	
Entering a New Customer	
Entering a New Primary Bill-To Address	
Entering a New Primary Bill To Address	4-28
Entering New Customer Contacts	
Entering Customer Contacts	4-36
Practice Lab	
Establishing Customer Relationships	
Creating Customer Relationships	
Practice Lab	
Routine Customer Table Maintenance	
Searching for Duplicate Customer Records	
Submitting the Duplicate Customer Report	
Practice Lab	4-57

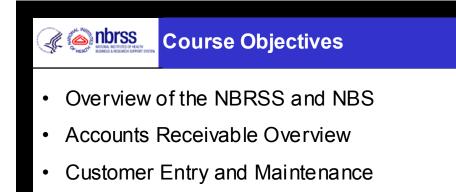
Deactivating Customer Records	4-58
Deactivating a Customer or a Customer Address	4-59
Practice Lab	4-66
Lesson Summary	4-67
Important Information	5-1
Important Information	5-2
Initial Oracle Set Up Required	
NBS Travel Support Resources	5-4
Contacting NBS Customer Support	5-5
Evaluation	5-6
Good Luck	5-7

NIH Receivables Customer Entry: Course Overview Chapter 1

NIH Receivables Customer Entry: Course Overview

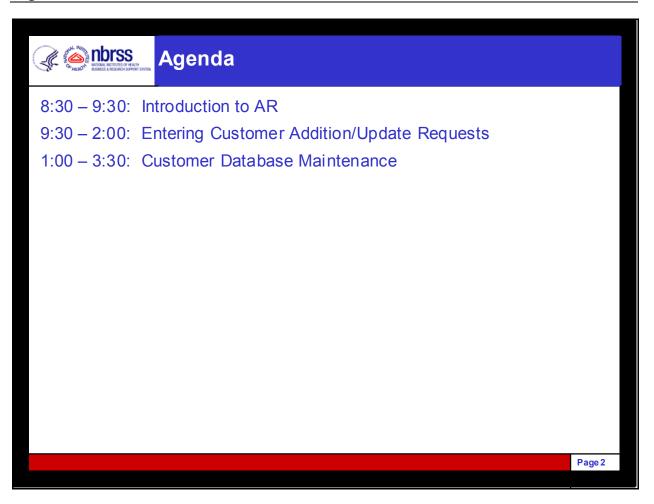


Course Objectives

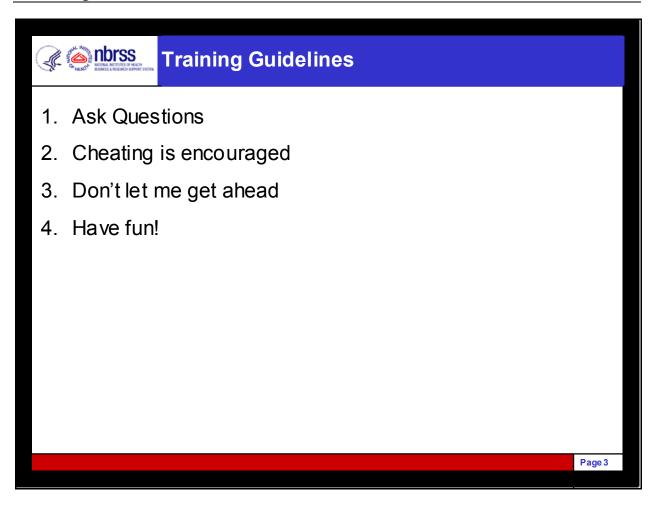


Important Dates

Agenda



Training Guidelines



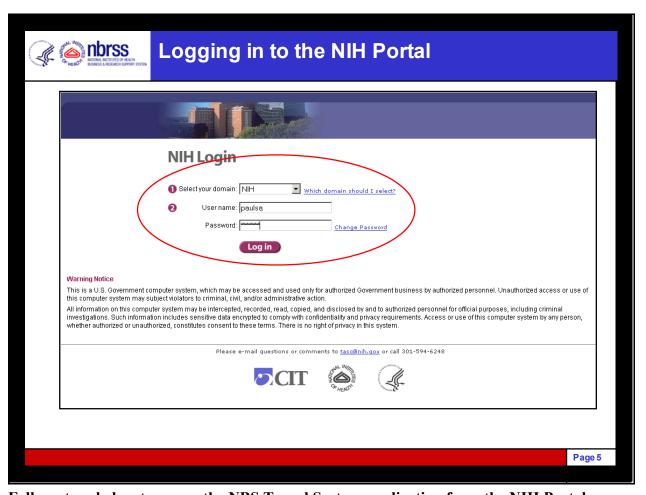
Accessing Oracle via the NIH Portal



Accessing Oracle via the NIH Portal

- > Oracle is a web-based application available via the NIH Portal
- ➤ NIH Portal website: http://my.nih.gov
 - To Log on use your:
 - NIH Domain
 - User Name
 - Password
 - For assistance, contact NIH Help Desk at 6-HELP (301.496.4357).
- ➤ Add the Budget & Finance Community, which is the page where the Oracle application resides



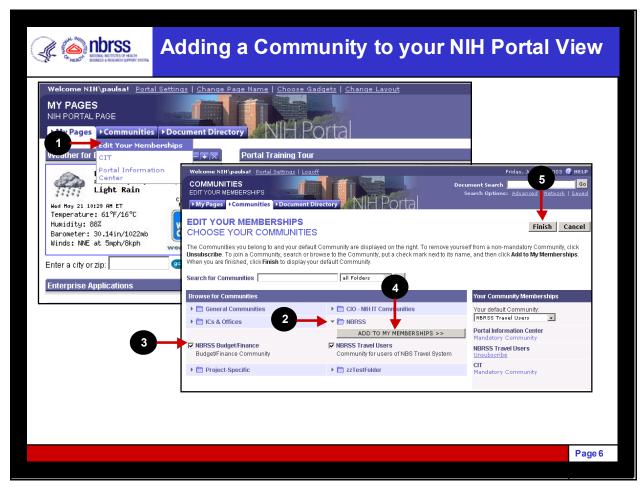


Follow steps below to access the NBS Travel System application from the NIH Portal.

- Launch Internet Explorer. In the browser, navigate to the NIH Portal at http://my.nih.gov. (Note: If you need Internet Explorer installed on your computer, please contact the NIH Help Desk at 6-HELP (301-496-4357)
- Sign in to the NIH Portal according to the steps listed below, using the account information you currently use to log on to Windows at your workstation.
 - Select your **domain** from the pull-down menu. (Hint: Use the "Which domain should I select? link for assistance.)
 - Enter your User name.
 - Enter your Password.
 - Click the **Log in** button.

For Portal account and password assistance, contact the NIH Help Desk at 6-HELP (301-496-4357).

Adding a Community to your NIH Portal View

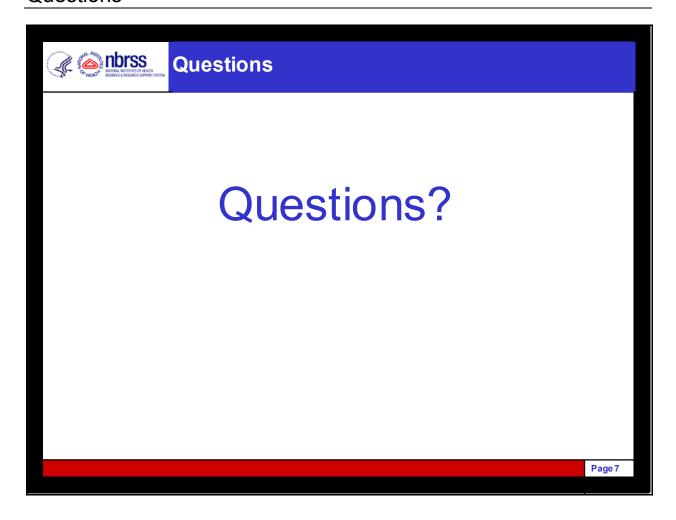


What is a Portal Community and how do I subscribe to a Portal Community?

Portal Communities provide content, documents and application access to users who have a common area of interest. Once you subscribe to a community, it will appear in the list on your Communities tab every time you visit the NIH portal. Follow the steps below to subscribe to a community.

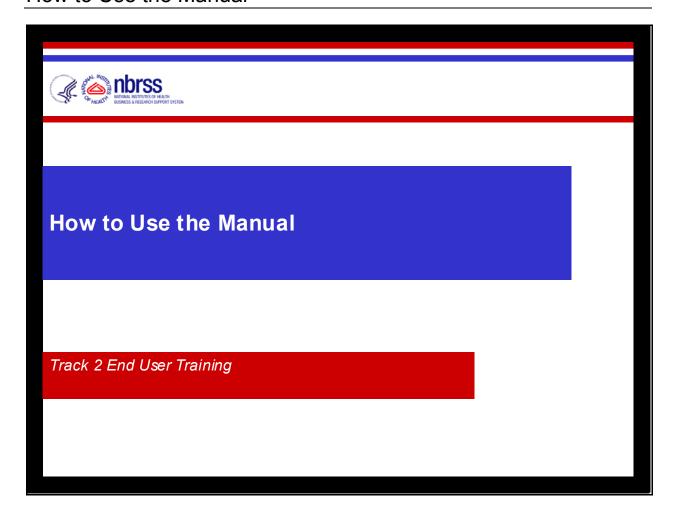
- Click on the "Communities" tab and select "Edit Your Memberships".
- Locate a community of interest either by clicking a folder to browse for communities or by entering a key word in the Search field and clicking "Go" to look for a specific community.
- Once you locate a community of interest, **select it** by clicking in the box next to the community name.
- Click "Add to my Memberships". (You may need to select your default community.)
- Click "Finish". The subscribed community will now appear in the list on your "Communities" Tab every time you access the portal.

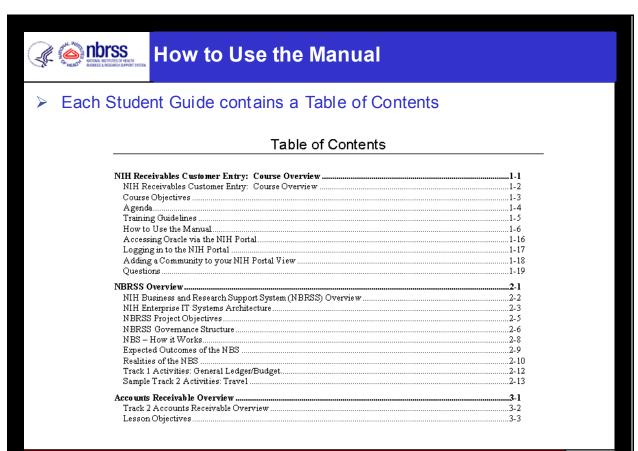
Questions

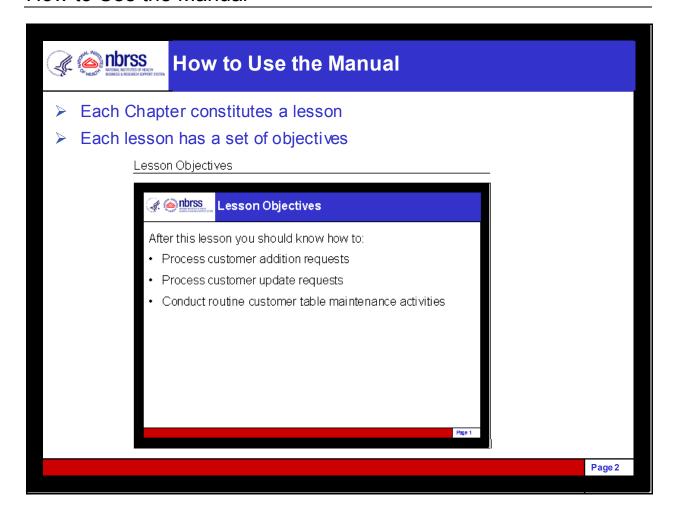


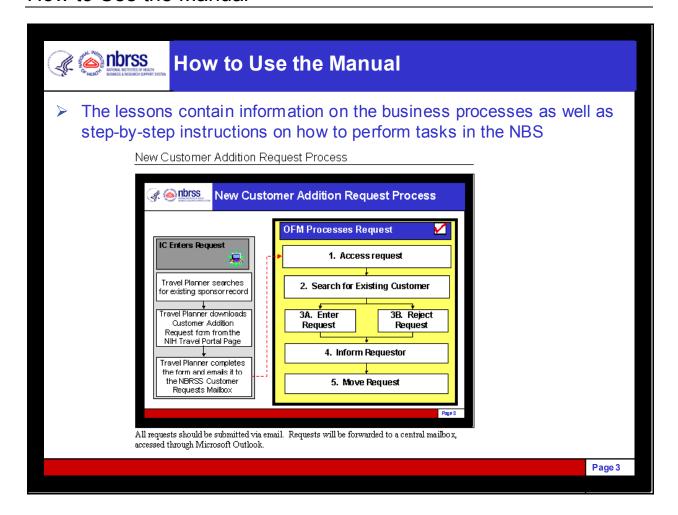


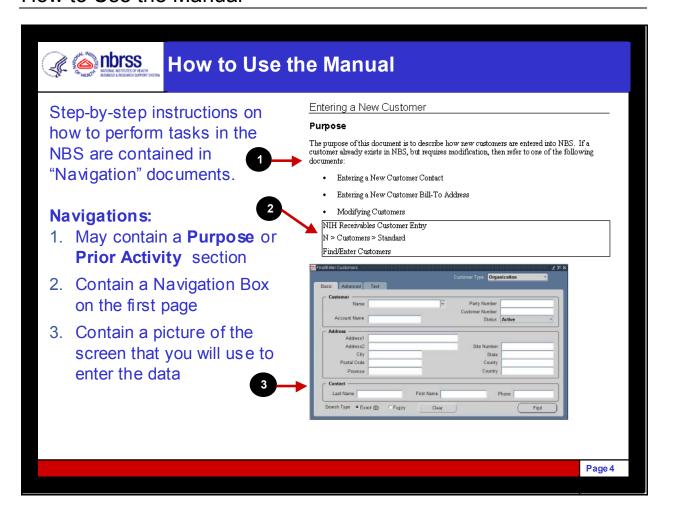
How to Use the Manual
Chapter 2

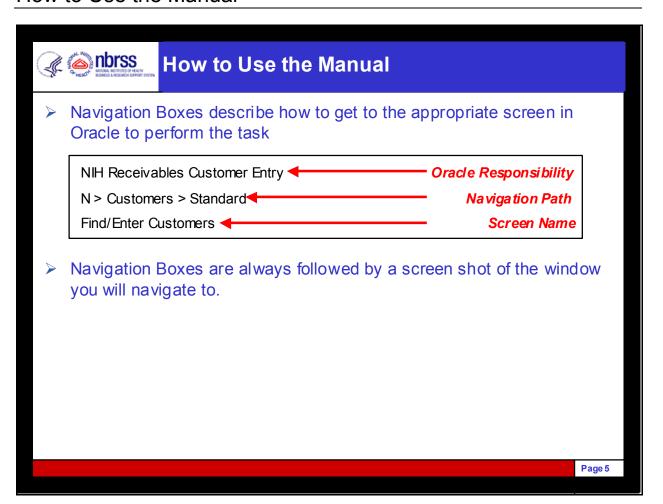


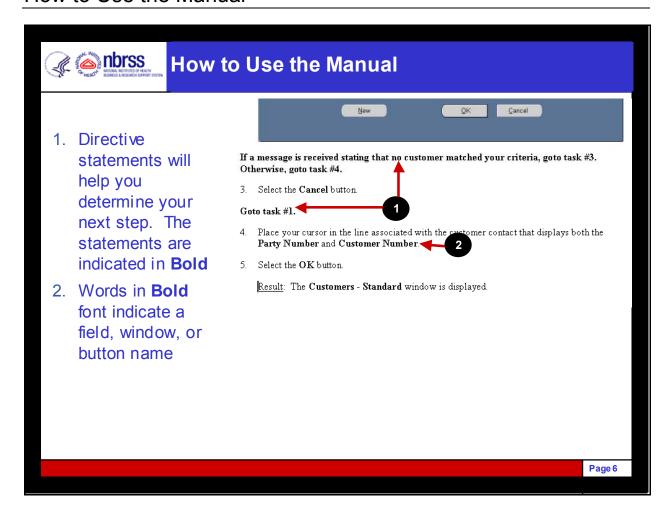














How to Use the Manual

The shaded fields indicate that the entry is optional or that you should accept the default values

- 7. Enter the city name in the Site Name field.
- 8. Enter the following address information.

Field	Description
Country	Select the appropriate country from the LOV.
Address	Enter the address line information
City	Enter the city name
State	Enter the state
Postal Code	Enter the Postal Code
Province	Enter the province abbreviation
County	Enter the county name

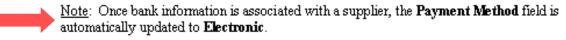
Example: The following is a sample completed Supplier Sites window.

If a field is not referenced, you should not change the default value.

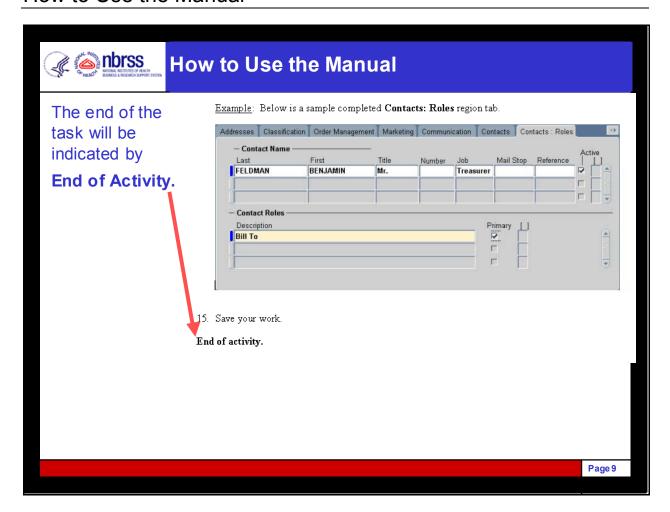


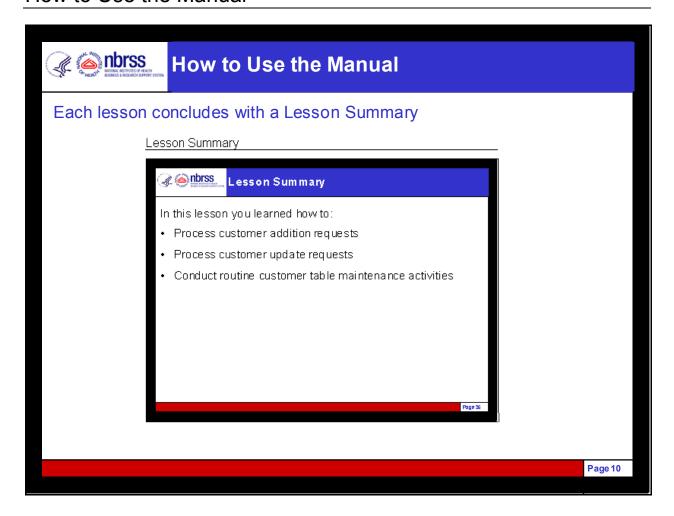
Notes provided after the task instruction provide useful information or helpful hints to complete the step.

13. In the Payment Method field, select the appropriate payment method for this supplier.



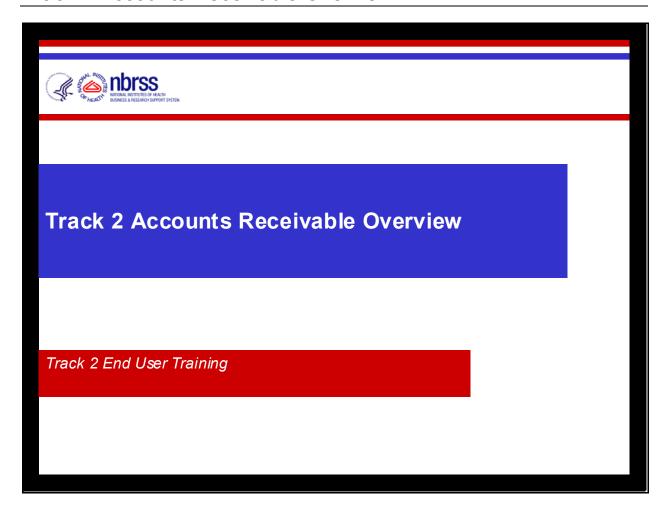
14. Save the record.





Accounts Overview	Receivable
Chapter 3	

Track 2 Accounts Receivable Overview



Lesson Objectives



Lesson Objectives

After this lesson you will know:

- What Accounts Receivable functionality is being used in Track 2
- The Accounts Receivable activities related to Sponsored Travel

Accounts Receivable Functionality



Accounts Receivable Functionality

Track 2 Accounts Receivable Activity is limited to Travel–related Transactions

Sponsored In-Cash Travel

- Sponsor information is held in customer table
- Sponsor in-cash invoices are created in AR upon approval of travel voucher in NBS Travel System
- Sponsor payments are entered and applied to outstanding invoices

Sponsored In-Cash Travel Activities



Sponsored In-Cash Travel Activities

> Customer Table Maintenance

- Sponsor information is held in the customer table
- Sponsor information must be entered into Accounts Receivable before being referenced on a travel document in the NBS Travel System

➤ Invoices for Sponsor in-cash expenses

- Invoices are generated upon approval of travel vouchers in NBS Travel System
- Invoices flow into AR automatically on a nightly basis
- Actual bills to sponsors will continue to be generated manually outside the NBS system

Sponsored Travel Payments

- Sponsor payments are entered and applied to outstanding invoices
- The Cashiers will do the initial entry
- The General Ledger Branch is responsible for applying receipts to outstanding invoices

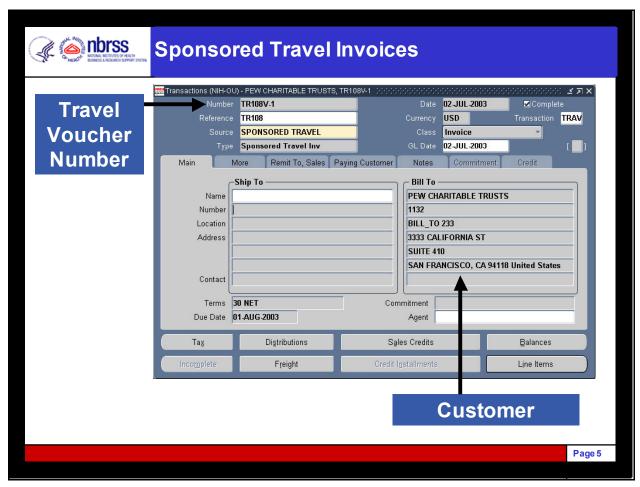
Customer Table



Customer Table Maintenance

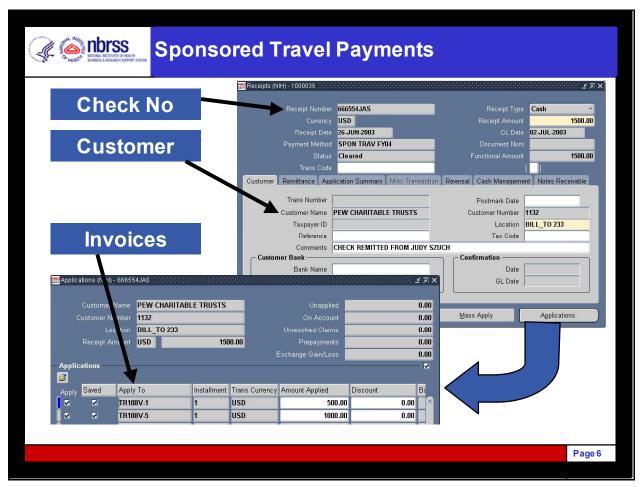
- Sponsor information is held in customer table
- Sponsor information must be entered into Accounts Receivable before being referenced on a travel document in the NBS Travel System
- Requests for new sponsors or updates to existing sponsors are handled through the submission of the Customer Request form to the NBRSS Customer Requests mailbox
- Customer table contains the sponsors name, address, and contact and billing information

Sponsored Travel Invoices



- Invoices are generated upon approval of travel vouchers in NBS Travel System
- Invoices flow into AR automatically on a nightly basis
- Actual bills to sponsors will continue to be generated manually outside the NBS system
- The **Transaction Number** in Accounts Receivable will be equal to the Travel Voucher number in the NBS Travel System
- The Source will always be Sponsored Travel
- The **Bill To** block displays the Customer or Sponsor information.

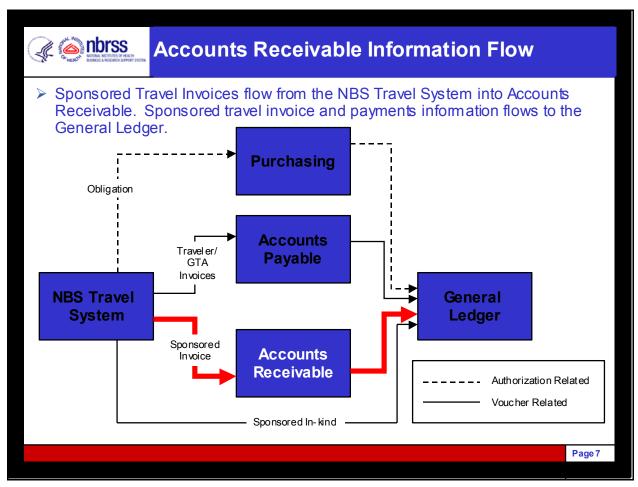
Sponsored Travel Payments



Accounts Receivable receipts record the payment of cash to the NIH.

- Sponsor payments are entered and applied to outstanding invoices
- The Cashiers will do the initial entry of the receipts
- The General Ledger Branch is responsible for applying receipts to outstanding invoices

Accounts Receivable Information Flow



The emphasized arrows indicate the flow of information related to Sponsored In-Cash Travel

Lesson Summary



After this lesson you learned:

- What Accounts Receivable functionality is being used in Track 2
- The Accounts Receivable activities related to Sponsored Travel

Maintaining the Customer
Table Chapter 4

Maintaining the Customer Table



Lesson Objectives



Lesson Objectives

After this lesson you should know how to:

- Process customer requests
- Establish customer relationships
- Conduct routine customer table maintenance activities

Page 1

Roles and Responsibilities



Roles and Responsibilities

ICs

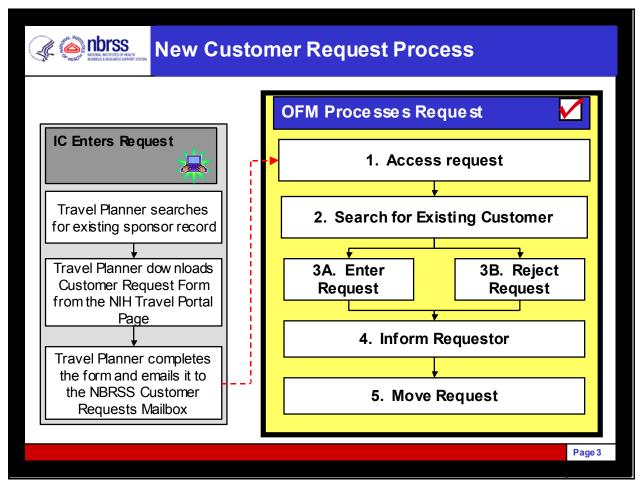
- ✓ Complete the Customer Request Form
- ✓ Send the completed form to the NBRSS Customer Requests mailbox

OFM

- ✓ Review request for accuracy, completeness, and need
- ✓ Approve or reject the request
- ✓ Enter and update customer records
- ✓ Notify IC requestor of action
- ✓ Perform routine customer maintenance

Page 2

Option 3: Oracle Extension



All requests should be submitted via email. Requests will be forwarded to a central mailbox (NBRSS – Customer Requests), accessed through Microsoft Outlook.

The NIH Customer Request Form is a Microsoft Excel document that the travel planners will complete and send via email to the NBRSS – Customer Requests mailbox for sponsor updates.

The NBRSS – Customer Requests mailbox will be accessible for those users with the NIH Receivables Customer Entry responsibility.

The NIH Receivables Customer Entry Staff should review the request to first ensure that it is not duplicative of another customer within the database.

Best practice indicates that a single record should exist for an organization. If the organization has multiple locations, separate sites can be set up for the customer under the main header record.

In addition to name and address information, contact information for specific individuals may be saved in the customer database. The contacts may help facilitate collection of receipts and research.

Process Customer Requests



Process Customer Requests

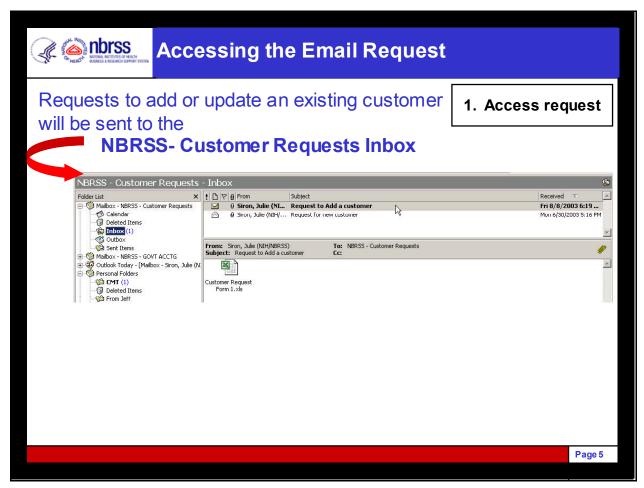
After this lesson you should know how to:

→ Process customer requests

- Establish customer relationships
- Conduct routine customer table maintenance activities

Page 4

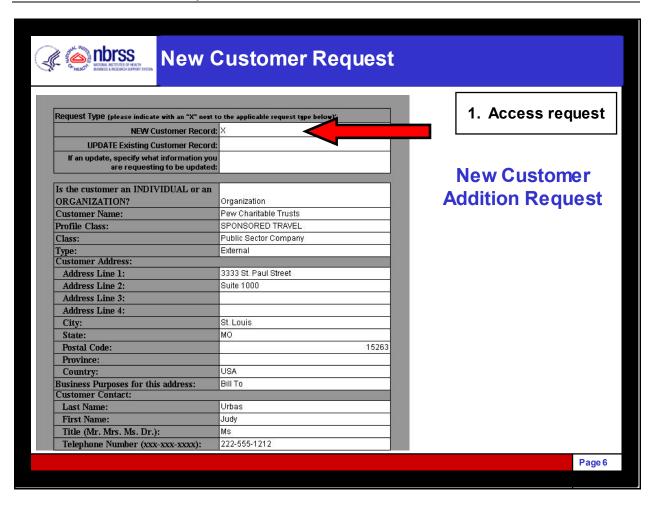
Accessing the Email Request



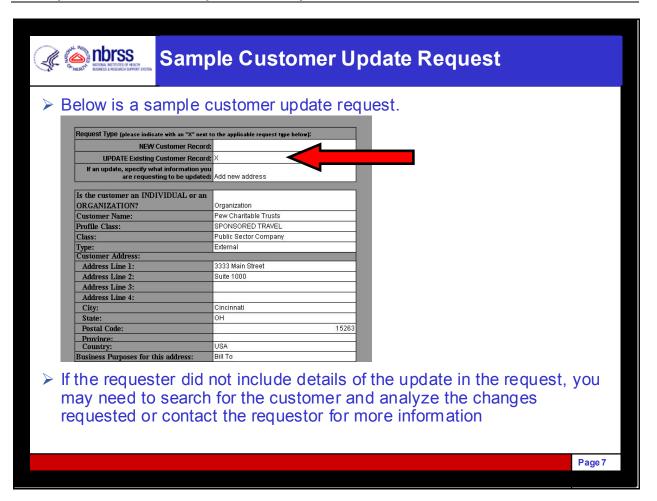
To access the email request:

- Open Microsoft Outlook
- Select the Mailbox NBRSS Customer Requests Inbox
- Double click on the message to open
- Double click on the attachment to view the request

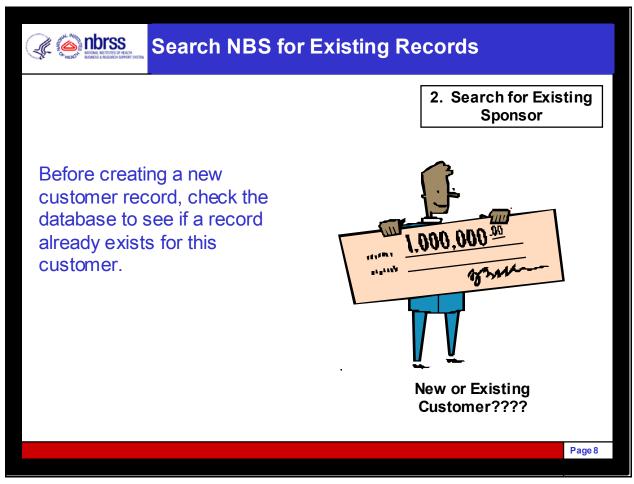
New Customer Request



Sample Customer Update Request

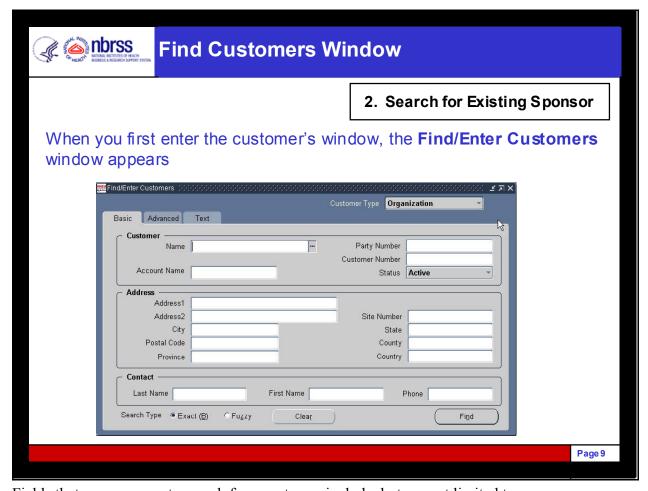


Search NBS for Existing Records



Use the information displayed in the email request to search for the sponsor.

If a request for a new record is received for a sponsor who exists in the NBS, inform the requestor and request that they use the existing record if applicable.



Fields that you may use to search for a customer include, but are not limited to:

- Customer Name
- Address Information, such as City, State, or Postal Code.
- Name of Contact Persons

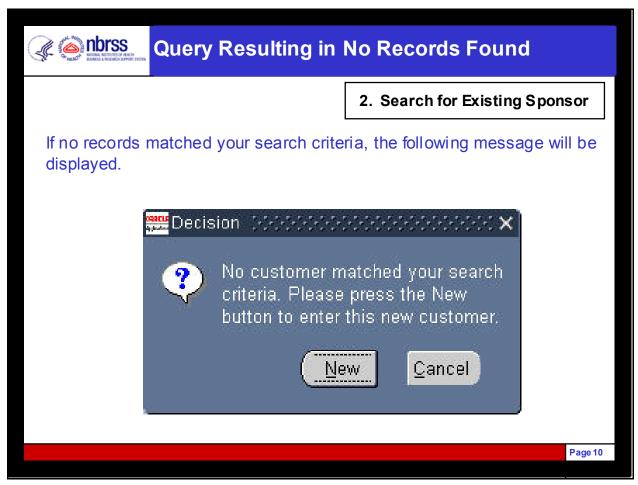
Converted customer information includes name and address information only. No contact information is being populated.

Be sure to use the wildcard character % when needed.

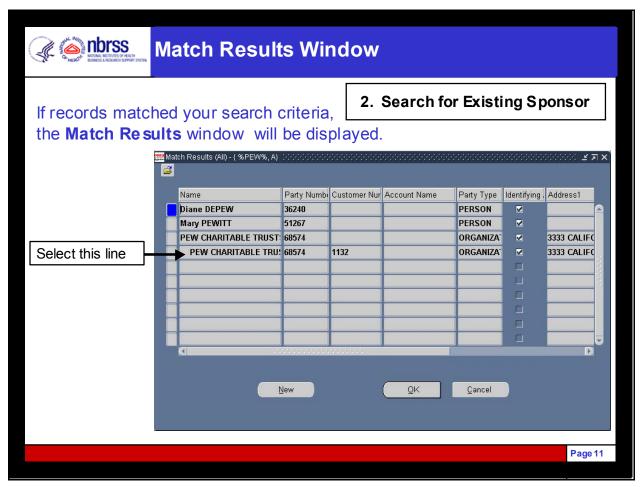
Steps:

- 1. Enter Search Criteria
- 2. Select the **Find** button

Query Resulting in No Records Found



To conduct a new search, select the **Cancel** button and you are returned to the **Find/Enter Customers** window.

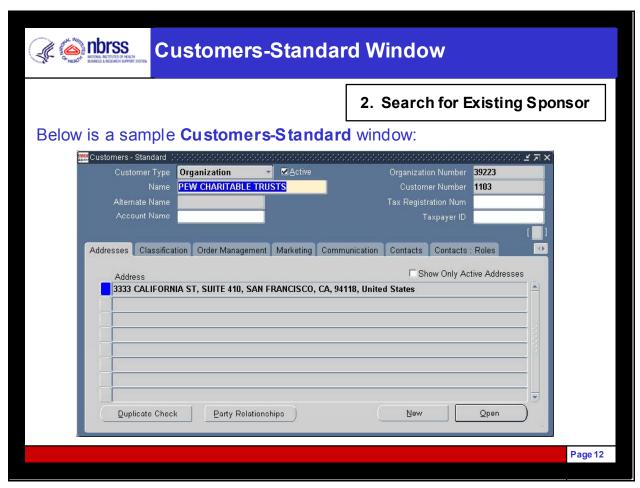


If records match your search criteria, your results will be displayed.

To review the record in more detail, place your cursor in the line of the organization you want to view and select **OK**.

<u>Important</u>: If the organization is listed more than once, select a line that has both a **Party Number** and a **Customer Number**.

Customers-Standard Window

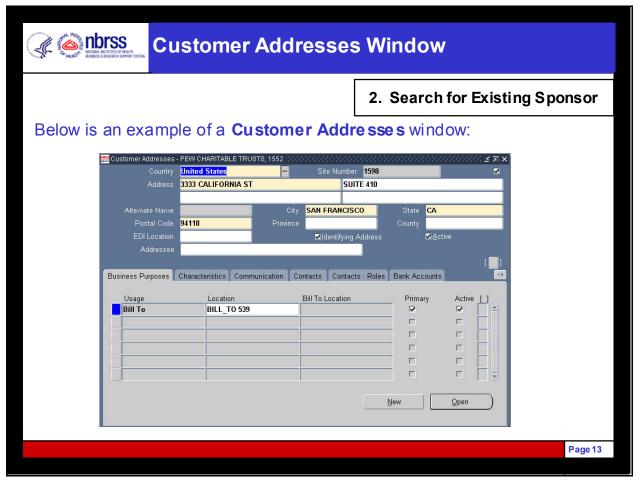


The **Customers** – **Standard** window displays the header information for the customer.

The form contains the following region tabs that will may be used when entering sponsors:

- Addresses
- Classification
- Communication
- Contacts
- Contacts: Roles
- Payment Methods
- Relationships

To view detailed information about a given address, select the address on the **Addresses** tab and select the **Open** button.



The **Customer Addresses** window contains many of the same region tabs that were listed in the **Customer: Standard** window.

The Address window contains the **Business Purposes** tab in which you will identify a bill to address.

Each customer is required to have a single primary bill to address.

Customer Entry Options



Customer Entry Options

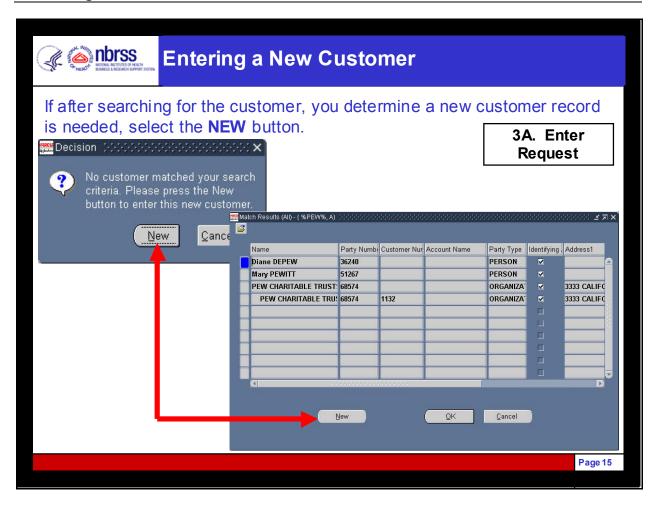
Follow the chart below to determine your next step after searching for an existing customer:

If	Then
A customer record is not found,	Enter a New Customer
A matching customer record is found but with a different address,	Enter a New Primary Bill-to Address
A matching customer record is found, but with different contact information,	Enter New Customer Contacts
A customer record is found matching the name, address, and contact information,	Do not enter any new information

If you have any questions about whether or not the records match, then follow up with the requestor.

Page 14

Entering a New Customer



Entering a New Customer

Purpose

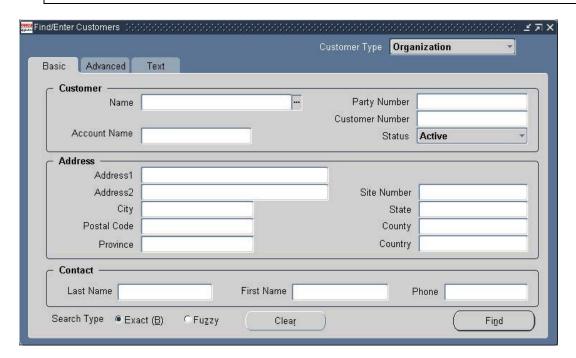
The purpose of this document is to describe how new customers are entered into NBS. If a customer already exists in NBS, but requires modification, then refer to one of the following documents:

- Entering a New Customer Contact
- Entering a New Customer Bill-To Address
- Modifying Customers

NIH Receivables Customer Entry

N > Customers > Standard

Find/Enter Customers



1. Enter the full or partial Customer Name in the **Name** field.

Notes:

- You must search for an existing customer before entering a new customer. This
 helps ensure that customers are not duplicated in the system.
- You may search for the customer based upon any or all of the fields available in the window.
- You may use the % as a wild card.

2. Select the **Find** button.

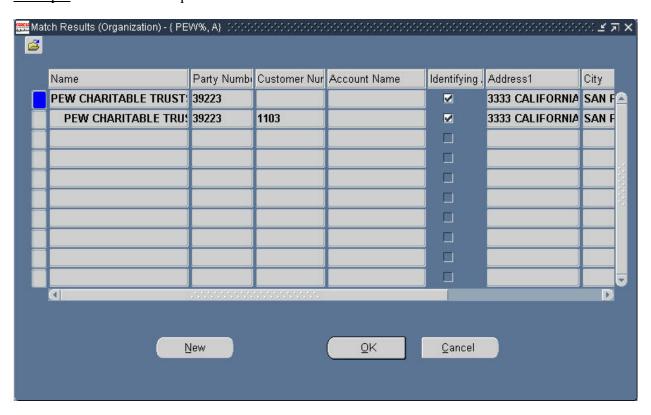
Example: Below is sample message when no records matched your search.



If a message is received stating that no customer matched your criteria, goto task #6. Otherwise, goto task #3.

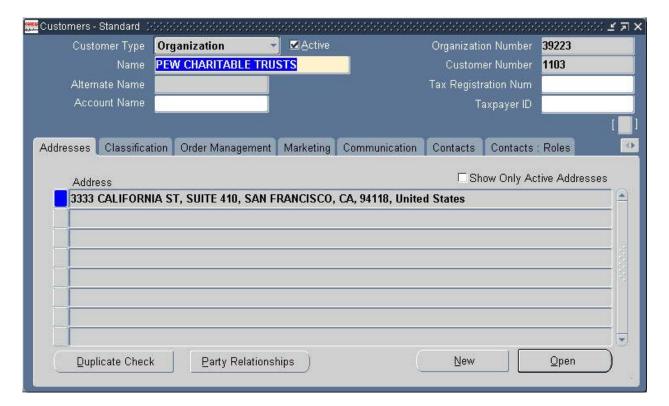
3. Review the customers resulting from your search.

Example: Below is a sample **Match Records** window.



4. Select the line with both the **Customer Number** and **Party Number** and select **OK**.

<u>Result</u>: The **Customers - Standard** window is displayed.

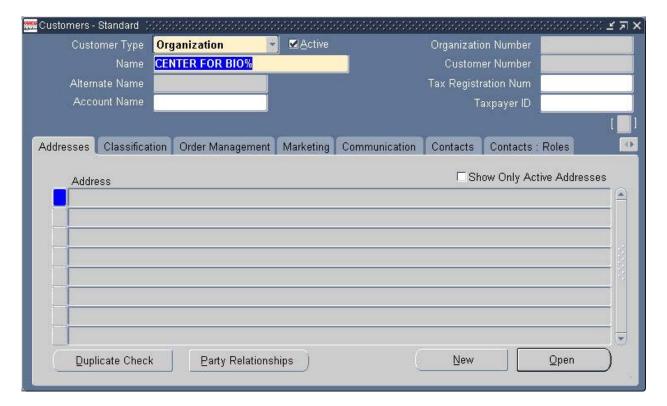


5. Review the complete customer information.

If the customer already exists, end of activity. Otherwise, goto task #6.

6. Select the **New** button.

Result: The Customers - Standard window is displayed.

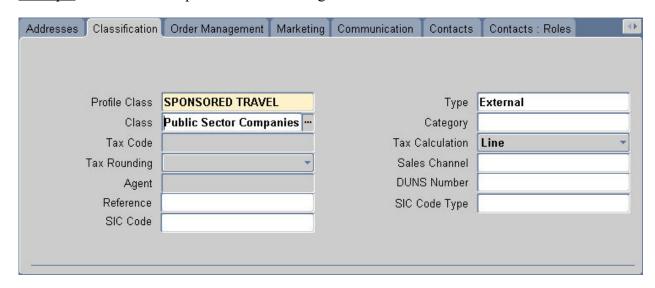


- 7. Review the **Name** field and edit the value if necessary.
- 8. Select the **Classification** region tab.

Result: The Classification fields are displayed.

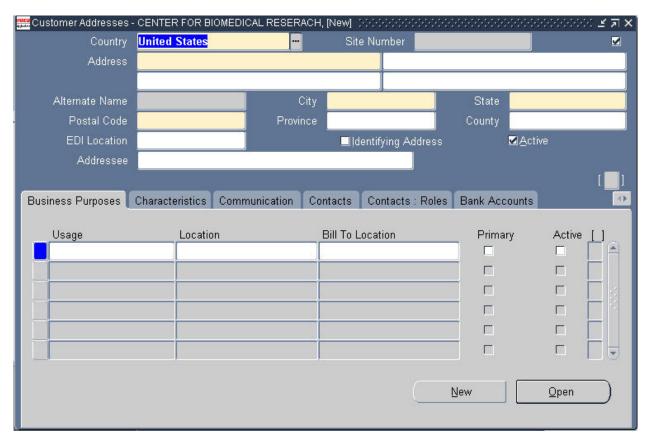
- 9. In the **Profile Class** field, select **Sponsored Travel** from the **LOV**.
- 10. In the Class field, select the appropriate value from the LOV.

Example: Below is a sample **Classification** region tab.



- 11. Select the **Addresses** region tab.
- 12. Select the New button.

<u>Result</u>: The **Customer Addresses** window is displayed.



13. Enter the customer's address as described below:

Field	Description
Country	Select the customer's country from the LOV
Address	Enter the address of the customer
Alternate Name	Enter an alternate name for the customer address
City	Enter the customer's city
State	Enter the customer's state
Postal Code	Enter the postal code
Province	Enter the Province
County	Enter the County

- 14. In the Usage field on the Business Purpose region tab and select Bill To from the LOV.
- 15. Type a value into the Location field.

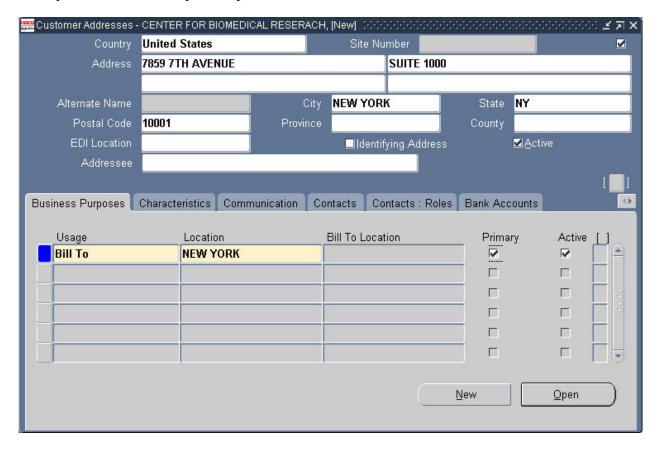
<u>Note</u>: We suggest that you use the city name for the location. This must be a unique value for this customer

If the address is the primary bill to location, goto task #16. Otherwise, goto task #17.

16. Select the **Primary** box, so that a checkmark appears.

Note: Each customer must have a single primary bill to location.

Example: Below is a sample completed **Customer Addresses** window.

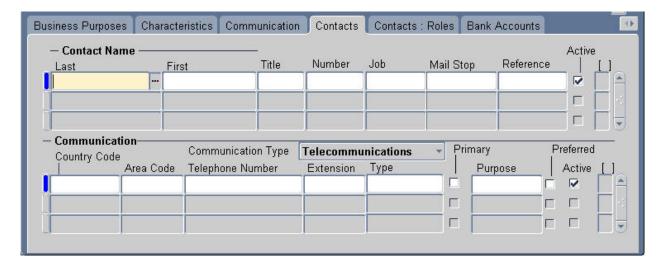


17. Review the customer contact information.

If specific people should be entered as contacts for this customer, goto task #18. Otherwise, goto task #23.

18. Select the Contacts tab.

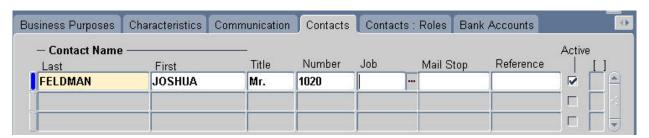
<u>Result</u>: The Contacts region tab is displayed.



19. Enter the **Contact Name** information as described below:

Field	Description
Contact Name:	
Last	Enter the contact's last name
First	Enter the contact's first name
Title	Select the contact's title from the LOV.

Example: Below is a sample completed Contact Name field.



If you would like to enter the contact's telephone information, goto task #20.

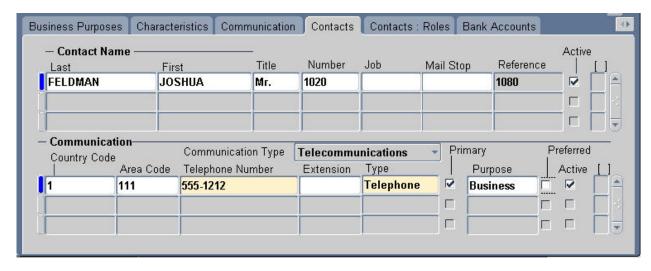
If you would like to enter the contact's e-mail information, goto task #21. Otherwise, goto task #23.

20. Enter the contact's telephone information in the **Communication** block.

Field	Description
Country Code	Enter the country code
Area Code	Enter the area code
Telephone Number	Enter the contact's telephone number
Extension	Enter the extension
Type	Select a type from the LOV
Primary	Enable the checkbox if this is the primary telephone number for

	the contact
Purpose	Select a purpose from the LOV
Preferred	Enable the checkbox if this is the preferred way of
	communicating with the customer
Active	Defaults to Active

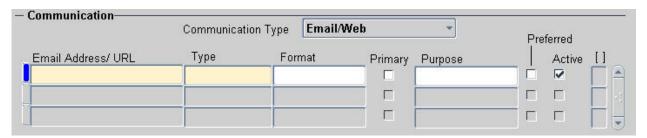
Example: Below is a sample completed **Communication** block.



If you would like to enter the contact's email information, goto task #21. Otherwise, goto task #23.

21. Use the drop down menu for the Communication Type field to select Email/Web.

Result: The email and web fields are displayed.

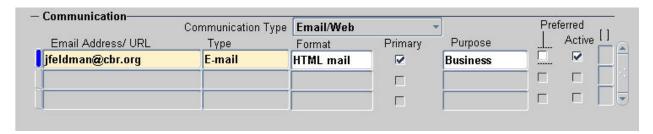


22. Enter the contact's email and web information.

Field	Description
Email Address/URL	Enter the email address of URL of the customer
Type	Select a type from the LOV
Format	Select a format from the LOV
Primary	Enable the checkbox if this is the primary telephone number for
	the contact
Purpose	Select a purpose from the LOV
Preferred	Enable the checkbox if this is the preferred way of

communicating with the customer

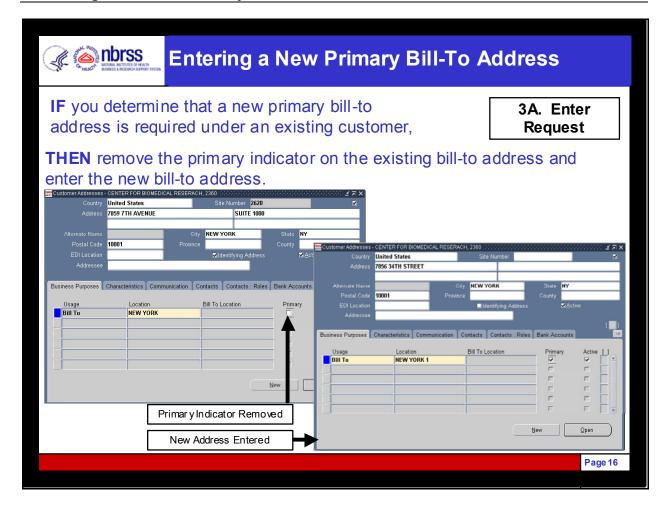
Example: Below is a completed Email/Web block.



23. Save the record.

End of activity.

Entering a New Primary Bill-To Address



Entering a New Primary Bill To Address

Purpose

The purpose of this document is to describe how to modify a customer's primary bill to address.

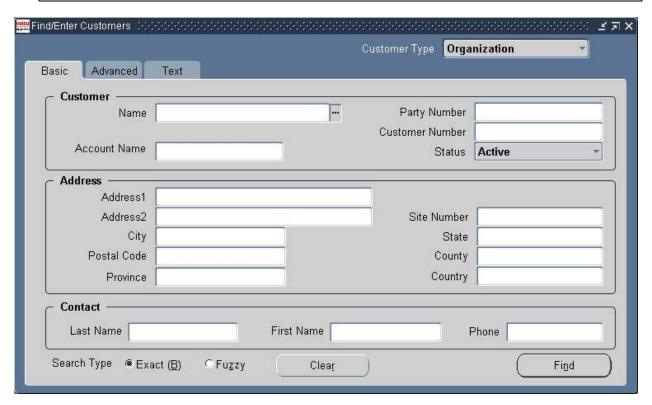
Before you begin

The customer must be entered in NBS. Refer to Entering a New Customer [NAV4011A]

NIH Receivables Customer Entry

N > Customers > Standard

Find/Enter Customers

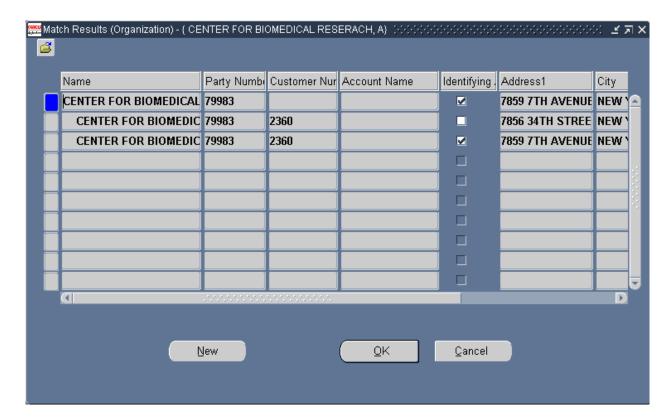


1. Enter the full or partial Customer Name in the **Name** field.

Notes:

- You may search for the customer based upon any or all of the fields available in the window.
- You may use the % as a wild card.
- Select the Find button.

Example: Below is a sample results window.



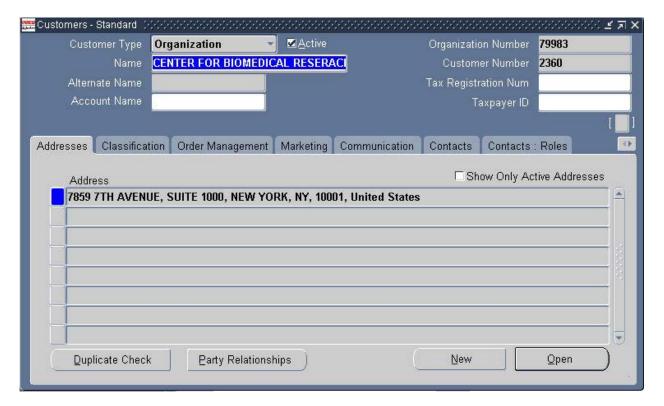
If a message is received stating that no customer matched your criteria, goto task #3. Otherwise, goto task #4.

3. Select the **Cancel** button.

Goto task #1.

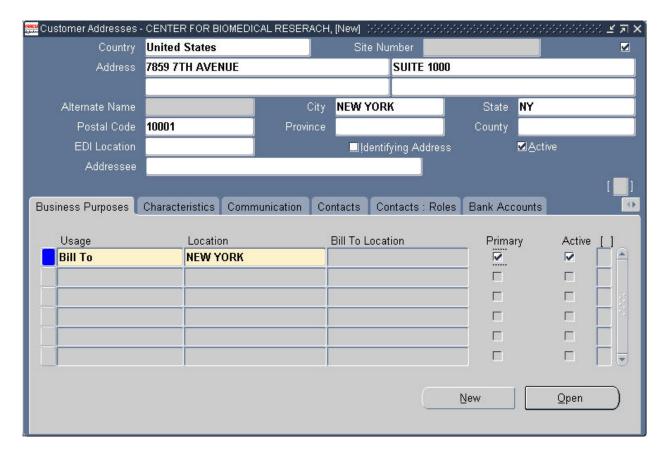
- 4. Highlight the line associated with the customer's primary bill-to address that displays both the **Party Number** and **Customer Number**.
- 5. Select the **OK** button.

Result: The Customers - Standard window is displayed.



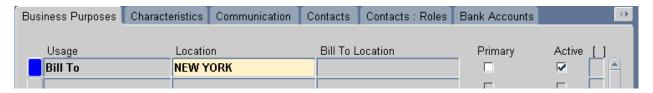
6. In the **Addresses** region tab, place your cursor in the line of the current primary bill-to address and select **Open**.

Result: The Customer Addresses window is displayed.



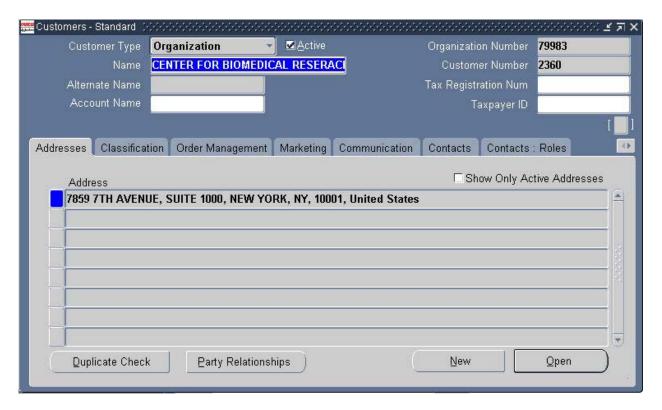
7. In the **Bill To** line on the **Business Purpose** tab, deselect the **Primary** box so that a checkmark does not appear.

Example: Below is a sample.



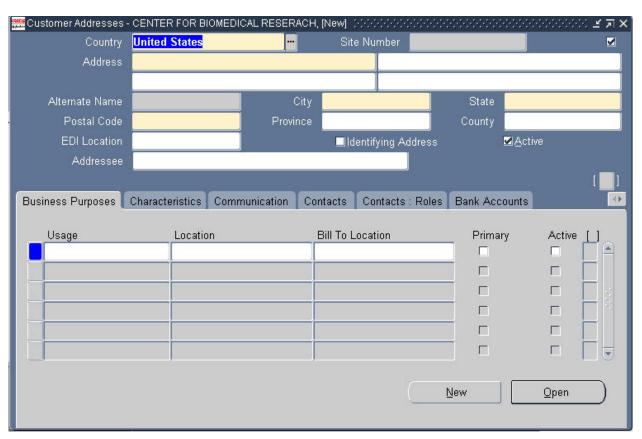
- 8. Save your work.
- 9. Close the **Customer Addresses** window.

<u>Result</u>: The Customers - Standard window is displayed.



10. Select the **New** button.

<u>Result</u>: The **Customers Addresses** window is displayed.



11. Enter the customer's address as described below:

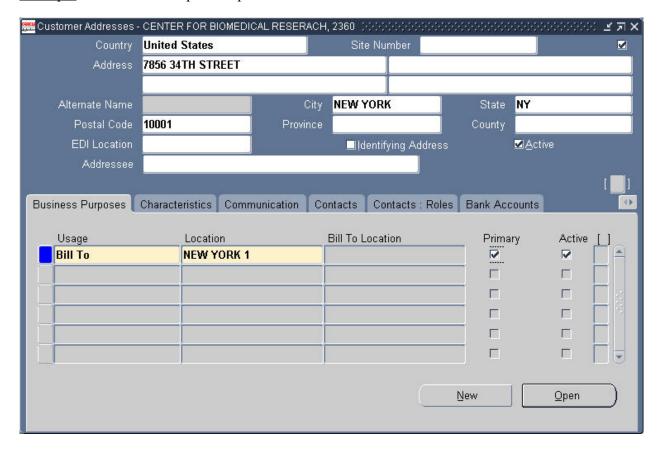
Field	Description
Country	Select the customer's country from the LOV
Address	Enter the address of the customer
Alternate Name	Enter an alternate name for the customer address
City	Enter the customer's city
State	Enter the customer's state
Postal Code	Enter the postal code
Province	Enter the Province
County	Enter the County

- 12. In the Usage field on the Business Purpose region tab and select Bill To from the LOV.
- 13. Type a value into the **Location** field.

<u>Note</u>: We suggest that you use the city name for the location. This must be a unique value for this customer

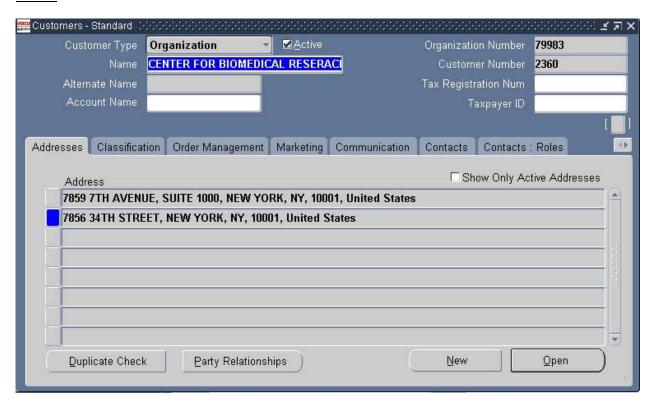
14. Select the **Primary** box, so that a checkmark appears.

Example: Below is a sample completed Customer Addresses window.



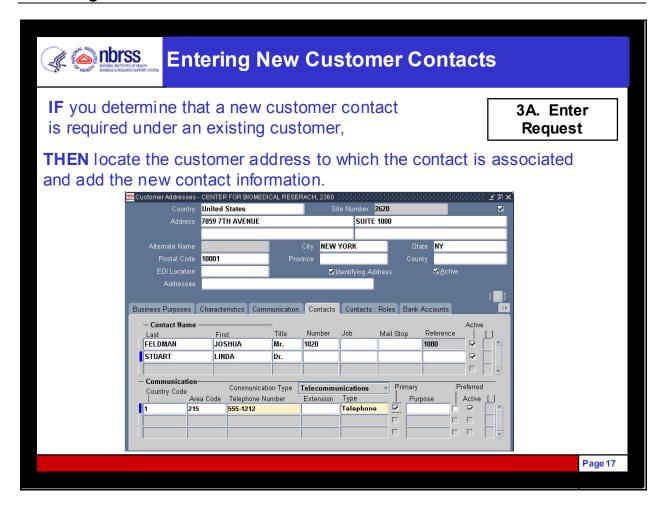
- 15. Save your work
- 16. Close the **Customer Addresses** window.

Result: You are returned to the Customers-Standard window.



End of activity.

Entering New Customer Contacts



Entering Customer Contacts

Purpose

The purpose of this document is to describe how to enter customer contacts into the customer record in NBS. These customer contacts can be used to follow up with the customer on outstanding invoices or payments received.

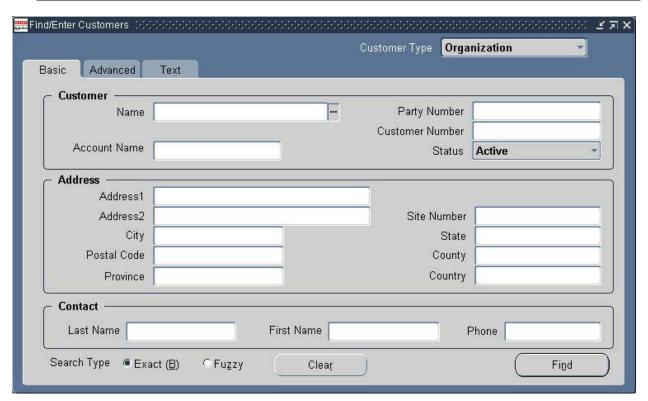
Before you begin

Before you begin, the customer must be entered into NBS. Refer to *Entering New Customers [NAV4011A]*

NIH Receivables Customer Entry

N > Customers > Standard

Find/Enter Customers



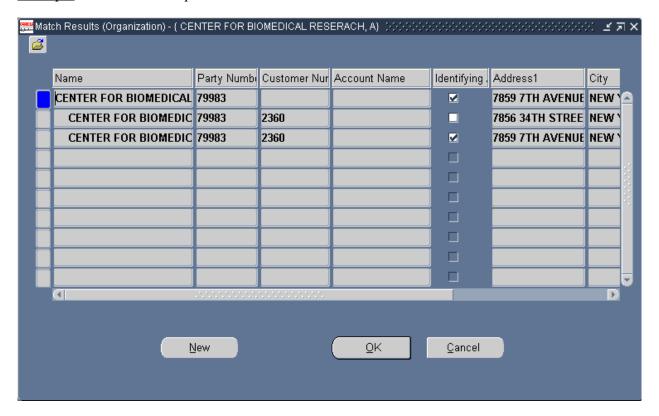
1. Enter the full customer name or a partial customer name in the **Name** field.

Notes:

- You may search for the customer based upon any or all of the fields available in the window.
- You may use the % as a wild card.

2. Select the **Find** button.

Example: Below is a sample results window.



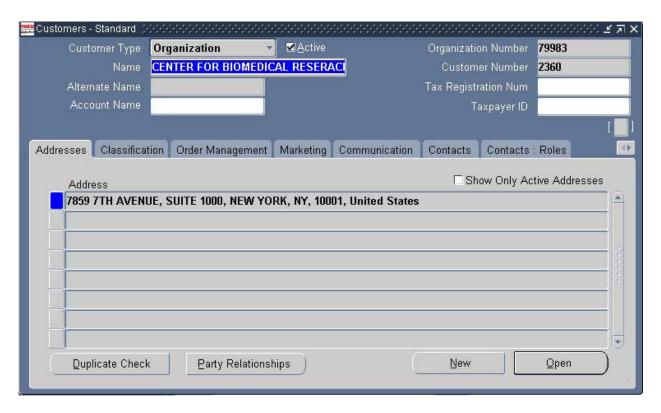
If a message is received stating that no customer matched your criteria, goto task #3. Otherwise, goto task #4.

3. Select the **Cancel** button.

Goto task #1.

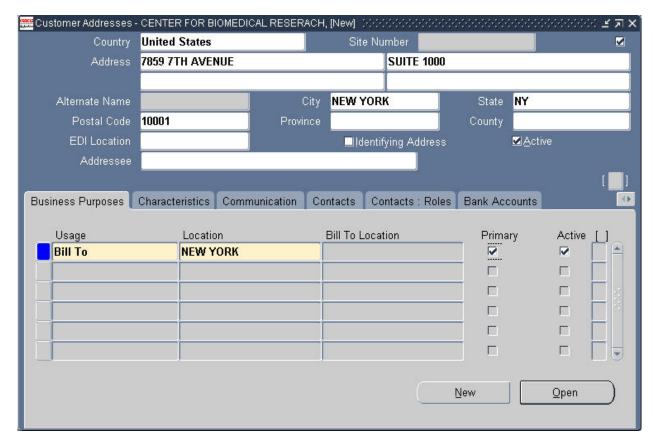
- 4. Place your cursor in the line associated with the customer contact that displays both the **Party Number** and **Customer Number**.
- 5. Select the **OK** button.

Result: The Customers - Standard window is displayed.



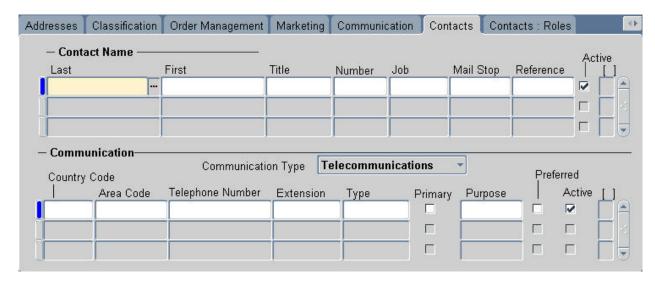
6. Place your cursor in the address to which the contact is related and select the **Open** button.

<u>Result</u>: The **Customer Addresses** window is displayed.



7. Select the **Contacts** region tab.

Result: The Contacts region tab is displayed.



8. Enter the **Contact Name** information as described below:

Field	Description	
Contact Name:		
Last	Enter the contact's last name	
First	Enter the contact's first name	
Title	Select the contact's title from the LOV.	

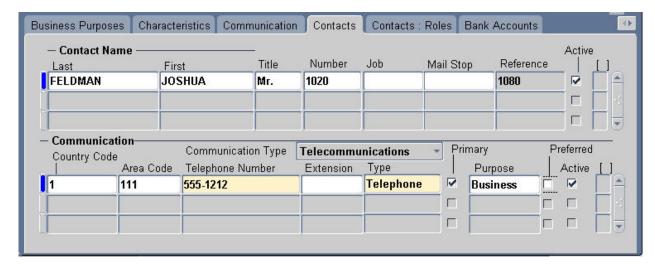
If you would like to enter the contact's telephone information, goto task #9.

If you would like to enter the contact's e-mail information, goto task #10. Otherwise, goto task #12.

9. Enter the contact's telephone information in the **Communication** block.

Field	Description	
Country Code	Enter the country code	
Area Code	Enter the area code	
Telephone Number	Enter the contact's telephone number	
Extension	Enter the extension	
Type	Select a type from the LOV	
Primary	Enable the checkbox if this is the primary telephone number for	
	the contact	
Purpose	Select a purpose from the LOV	
Preferred	Enable the checkbox if this is the preferred way of	
	communicating with the customer	
Active	Defaults to Active	

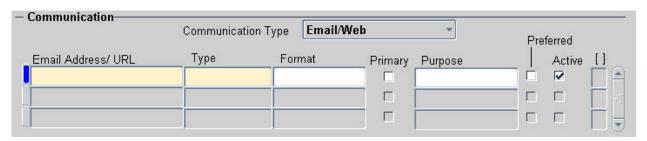
Example: Below is a sample completed **Communication** block.



If you would like to enter the contact's email information, goto task #10. Otherwise, goto task #12.

10. Use the drop down menu for the **Communication Type** field to select **Email/Web**.

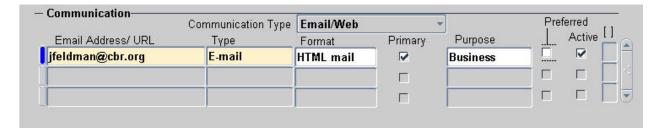
Result: The email and web fields are displayed.



11. Enter the contact's email and web information.

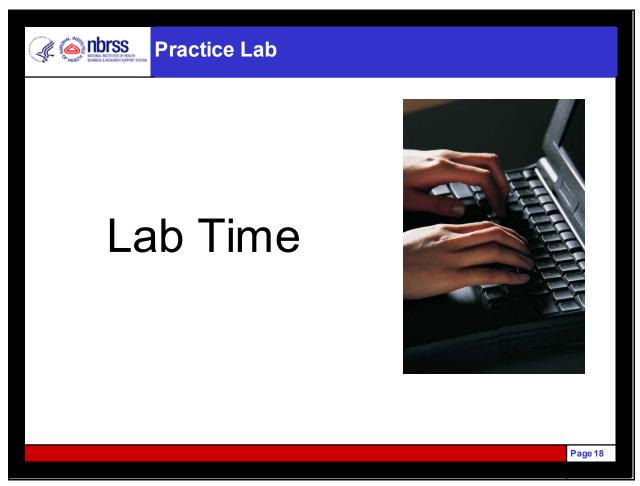
Field	Description	
Email Address/URL	Enter the email address of URL of the customer	
Type	Select a type from the LOV	
Format	Select a format from the LOV	
Primary	Enable the checkbox if this is the primary telephone number for	
-	the contact	
Purpose	Select a purpose from the LOV	
Preferred	Enable the checkbox if this is the preferred way of	
	communicating with the customer	

Example: Below is a completed **Email/Web** block.



12. Save the record.

End of activity.



Complete <u>Lab 1: Processing Customer Requests</u>

Establishing Customer Relationships

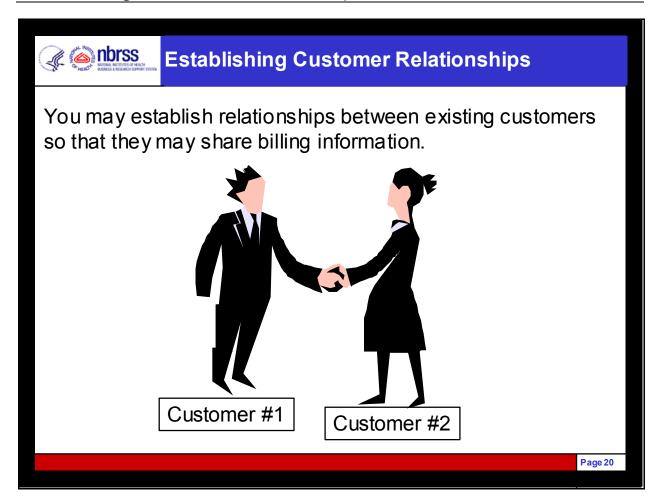


Establishing Customer Relationships

After this lesson you should know how to:

- Process customer requests
- → Establish customer relationships
- Conduct routine customer table maintenance activities

Establishing Customer Relationships



Creating Customer Relationships

Purpose

The purpose of this document is to describe how to create relationships between customer records to allow customers to remit payment on each other's invoices.

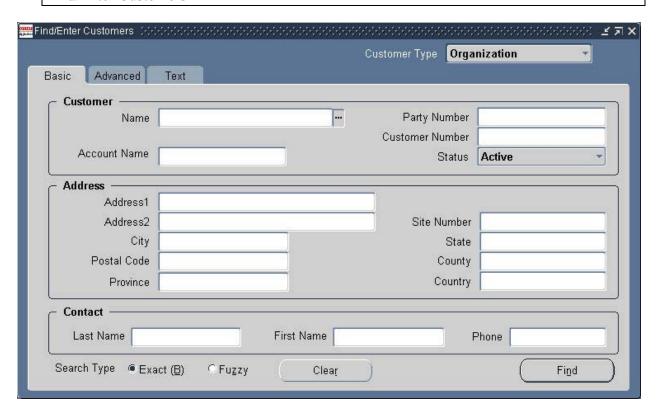
Before you begin

Before you begin, the customer must be entered into NBS. Refer to *Entering New Customers* [NAV4011A]

NIH Receivables Customer Entry

N > Customers > Standard

Find/Enter Customers

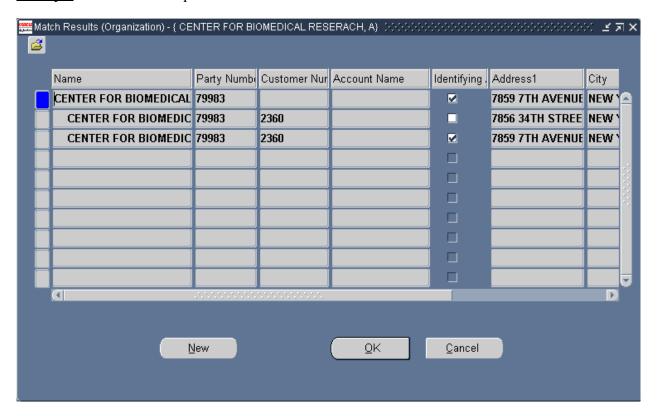


1. Enter the full customer name or a partial customer name in the **Name** field.

Notes:

- You may search for the customer based upon any or all of the fields available in the window.
- You may use the % as a wild card.
- 2. Select the **Find** button.

Example: Below is a sample results window.



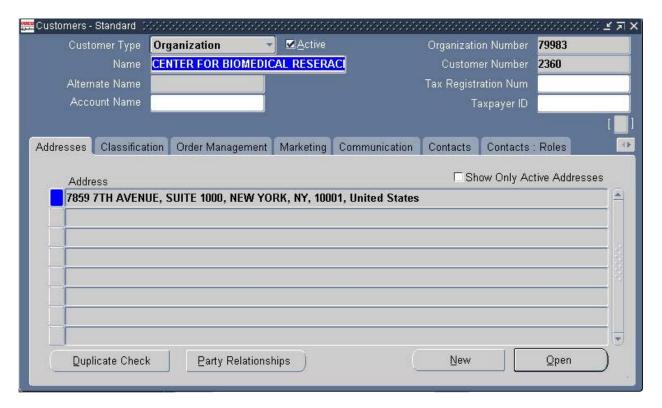
If a message is received stating that no customer matched your criteria, goto task #3. Otherwise, goto task #4.

3. Select the Cancel button.

Goto task #1.

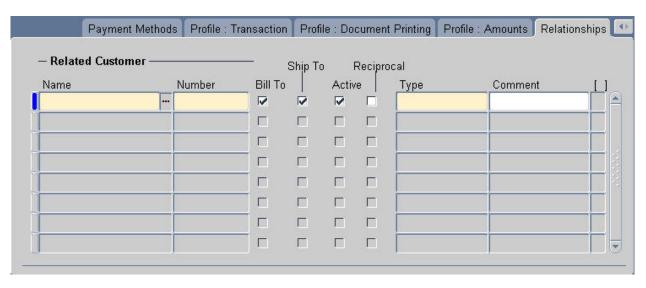
- 4. Place your cursor in the line for the customer that displays both the **Party Number** and **Customer Number**.
- 5. Select the **OK** button.

Result: The Customers - Standard window is displayed.



6. Use the More Folders icon to select the **Relationships** tab.

Result: The **Relationships** region tab is displayed.



7. In the **Related Customer Name** field, use the **LOV** to locate the customer that has a relationship with the customer record displayed.

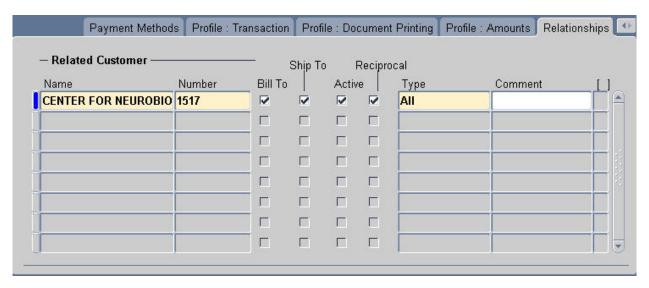
Result: The Related Customer Number field defaults.

8. Identify the customers' relationship by enabling the checkboxes as described below:

Field	Description	
Bill To	Enable the checkbox to allow the sharing of Bill To address	
Ship To	Enable the checkbox to allow the sharing of Bill To address	
Active	Enable the checkbox if the relationship is active	
Reciprocal	Enable the checkbox if the relationships are reciprocal	

- 9. Use the **LOV** to populate the **Type** field.
- 10. Enter any additional comments in the Comments field.

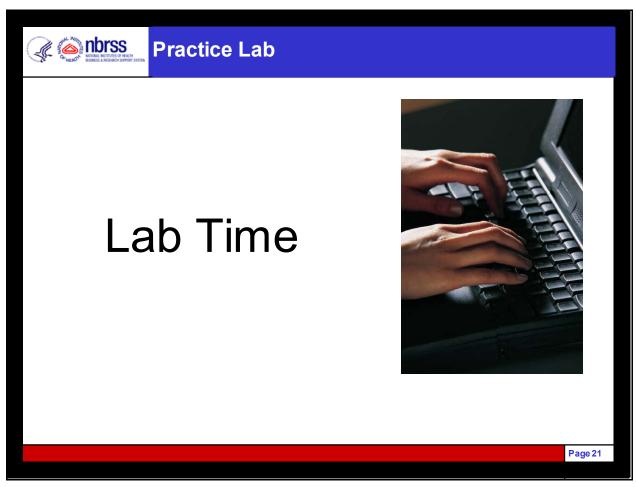
Example: Below is a sample completed **Relationships** tab.



11. Save the record.

End of activity.





Complete <u>Lab 2</u>: <u>Establishing Customer Relationships</u>

Routine Customer Table Maintenance



Routine Customer Table Maintenance

After this lesson you should know how to:

- Process customer requests
- Establish customer relationships
- → Conduct routine customer table maintenance activities

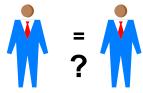
Routine Customer Table Maintenance



Routine Customer Table Maintenance

On a regular basis, we recommend performing routine customer table maintenance which includes:

1. Searching for Duplicate Customer Records

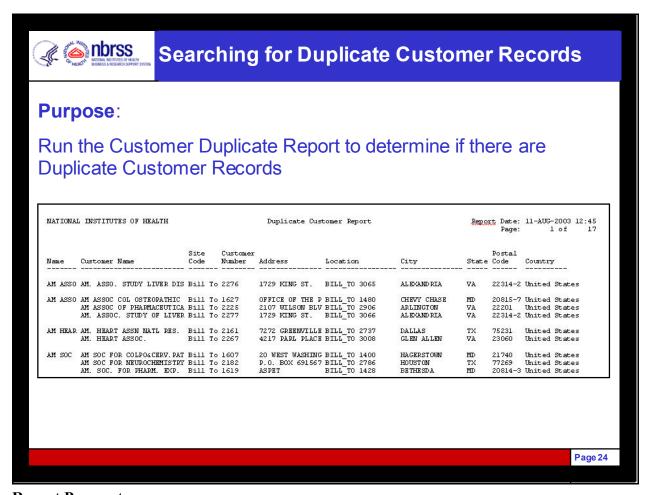


2.Deactivating Duplicate Customer Records





Searching for Duplicate Customer Records



Report Parameters

Customer Name: To restrict the search to a specific name, enter a customer name (optional). **Number of Characters:** Enter the number of characters that you think should be the same, for the customer names to be deemed as potential duplicates.

Report Headings

Address: The street address for this customer.

City: The city for this customer address.

Country: The country for this customer address.

Customer Name: The customer name.

Customer Number: The customer id number.

Postal Code: The postal code for this customer address. **Site Code:** The business purpose assigned to this address.

State: The state for this customer address.

Submitting the Duplicate Customer Report

NIH Receivables Customer Entry

N > Reports > Listing

Submit a New Request



1. Select the **OK** button.

Result: The **Submit Request** window is displayed.

2. Click on the **LOV** in the **Name** field and select **Duplicate Customer Report**.

Result: The **Parameters** window is displayed.



3. Enter your report parameters as described below:

Field	Description	
Number of Characters	Enter the number of characters that you want to compare	
Customer Name	Enter a particular customer name that you want to search for.	

4. Select the **OK** button.

Result: The **Parameters** window is no longer displayed.

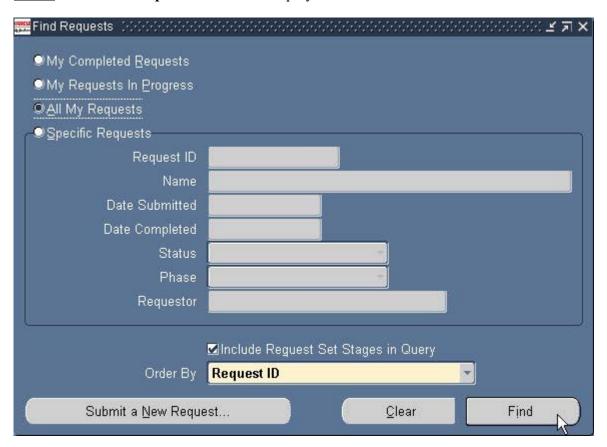
5. Select the **Submit** button.

Result: A **Decision** window is displayed.



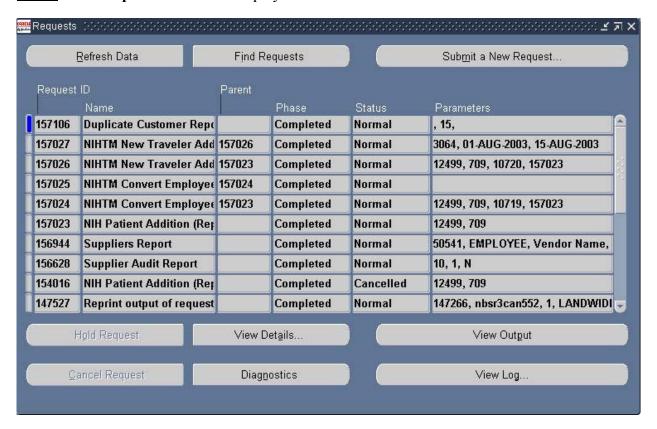
- 6. Select the **No** button if you do not want to submit a new request.
- 7. Review the status of your request by selecting M > View > Requests.

Result: The **Find Requests** window is displayed.



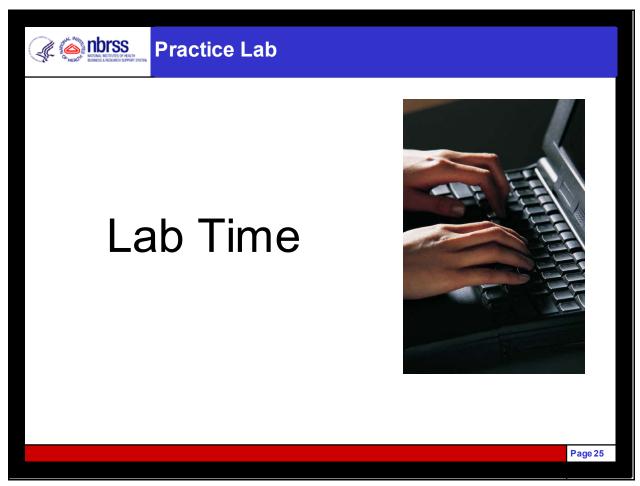
8. Select the **Find** button.

Result: The **Requests** window is displayed.



- 9. Select the **Refresh Data** button until the **Phase** field indicates completed.
- 10. Select the **View Output** button to view the report.

End of activity.



Complete <u>Lab 3: Duplicate Customer Report</u>

Deactivating Customer Records



Deactivating Customer Records

- You may deactivate a customer address or the entire customer record
- Impact: Customer record or address may not be referenced on future travel documents in the NBS Travel System
- This action can be reversed by enabling the active checkbox.

Deactivating a Customer or a Customer Address

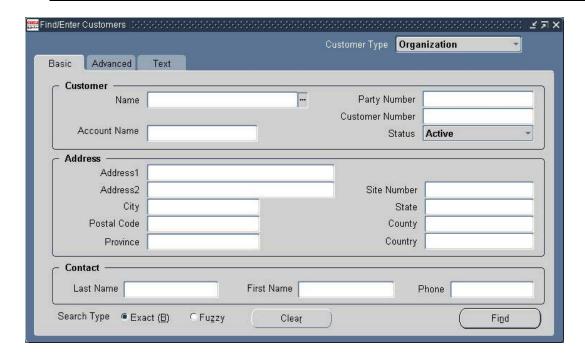
Purpose

The purpose of this document is to describe how to deactivate a customer or deactivate a customer's address. If the deactivated address is a primary address, a new primary address must be entered.

NIH Receivables Customer Entry

N > Customers > Standard

Find/Enter Customers

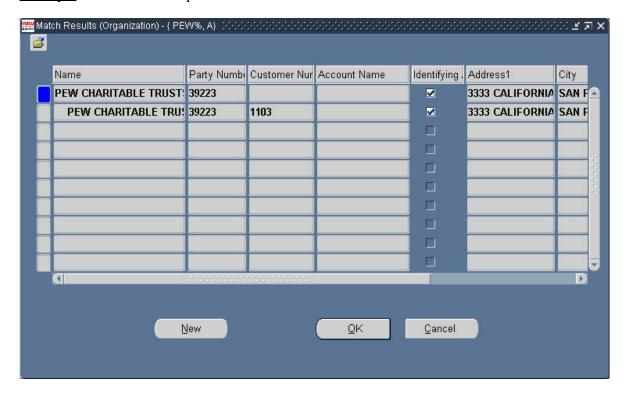


1. Enter the full or partial **Customer Name** in the Name field.

Notes:

- You may search for the customer based upon any or all of the fields available in the window.
- You may use the % as a wild card.
- 2. Select the **Find** button.

Example: Below is a sample results window.



If a message is received stating that no customer matched your criteria, goto task #3. Otherwise, goto task #4.

3. Select the **CANCEL** button.

Goto task #1.

- 4. Place your cursor in the line of the customer you which to deactivate that contains both the **Customer Number** and the **Party Number**.
- 5. Select the **OK** button.

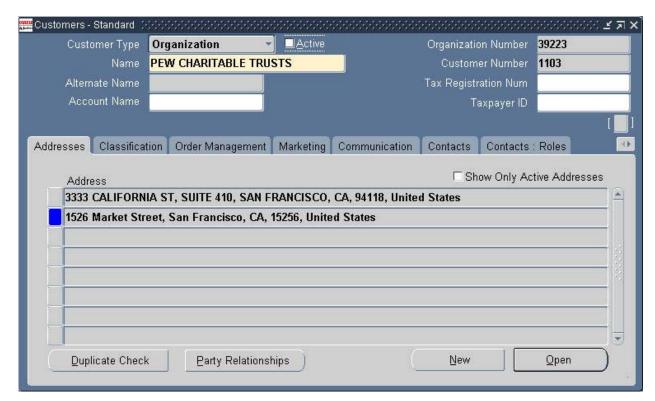
e Customers - Standard Organization 39223 PEW CHARITABLE TRUSTS 1103 Alternate Name Tax Registration Num Taxpayer ID Addresses Classification Order Management Marketing Communication Contacts Contacts : Roles ☐ Show Only Active Addresses Address 3333 CALIFORNIA ST, SUITE 410, SAN FRANCISCO, CA, 94118, United States **Open** Duplicate Check Party Relationships New

Result: The Customers - Standard window is displayed.

If the customer should be deactivated entirely, goto task #6. Otherwise, goto task #8.

6. Deselect the **Active** checkbox above the **Customer Name** field to deactivate the customer.

Example: Below is a sample inactive customer.



7. Save your changes.

End of activity.

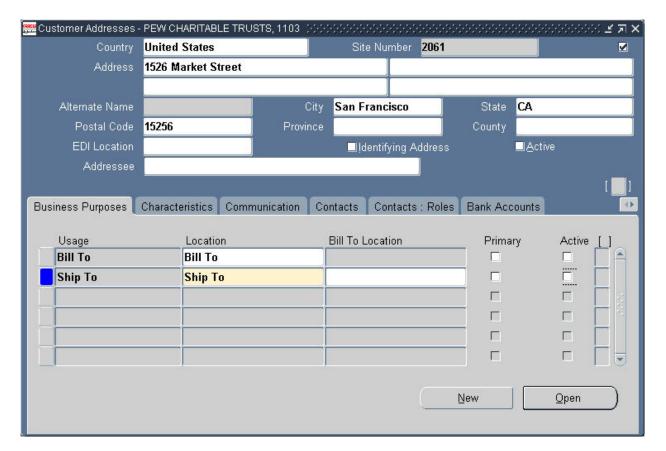
- 8. Highlight the address line that you would like to deactivate.
- 9. Select the **Open** button.

🚃 Customer Addresses - PEW CHARITABLE TRUSTS, 1103 (2000) 2000 (2000) **United States** Site Number 1352 V 3333 CALIFORNIA ST **SUITE 410** SAN FRANCISCO CA Alternate Name 94118 Postal Code **EDI** Location ☑ Active ☑ |dentifying Address Addressee Business Purposes | Characteristics | Communication Contacts Contacts : Roles Bank Accounts Usage Location Bill To Location Primary Active [] Bill To BILL TO V V New **Open**

Result: The Customer Addresses window is displayed.

- 10. Deselect the **Active** checkbox located under the **County** field, so that a checkmark no longer appears.
- 11. In each of the lines listed under the **Business Purposes** tab, deselect the **Active** and **Primary** boxes, so that a checkmark no longer appears.

Example: Below is a sample inactive address.

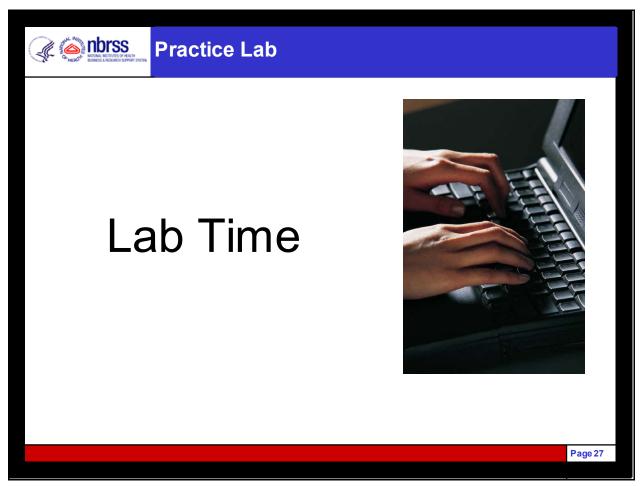


- 12. Save your work.
- 13. Close the Customer Addresses window.

Result: The Customer Standard window is displayed.

End of activity.





Complete <u>Lab 4</u>: <u>Deactivating Customer Records</u>

Lesson Summary



Lesson Summary

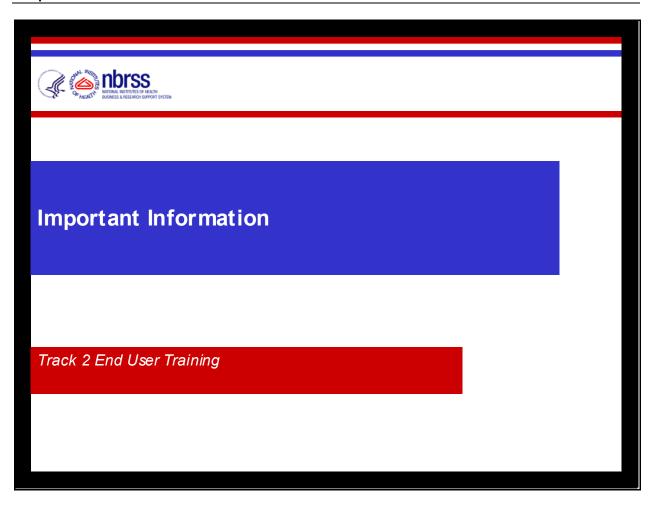
In this lesson you learned how to:

- Process customer addition requests
- Establish customer relationships
- Conduct routine customer table maintenance activities



	Important Information Chapter 5
Important Information	

Important Information



Initial Oracle Set Up Required



Initial Oracle Set Up Required

The first time you log into the NBS, you will be required to:

- Download Oracle J-Initiator and
- Update your internet browser security settings

Refer to the technical guidance provided on the NBS Technical website:http://nbs.nih.gov/technical.html

NBS Travel Support Resources



NBS Travel Support Resources

- ➤ NBS Travel Web links available 24/7
 - NBS Oracle Online Help and Reference: http://nbs.nih.gov/training.html
- ➤ NIH Portal Support
 - Phone NIH Help Desk at 6-HELP (301.496.4357)
 - Portal website address: http://my.nih.gov
- > NBS Customer Support
 - Phone: Call 5-NBS7 (301.435.6277)
 - E-mail: Send e-mail to tasc@NIH.gov
 - Web Request for Support: Submit to: http://support.cit.nih.gov
- > nVision
 - nVision is an evolution of the NIH Data Warehouse, and it is the new reporting system designed to work in concert with the NBS. nVision is a business intelligence system that delivers NIH-defined standard reports and facilitates the development of user-created ad hoc reports to support decision-making and analysis. The first NBS module to be supported by nVision is Trav el.
 - E-mail: Send e-mail to nVisionSupport@nih.gov
 - Web Site for information: http://nvision.nih.gov

Contacting NBS Customer Support



Contacting NBS Customer Support



- Phone: Call 6-HELP (301.496.4357)
- ➤ E-mail: Send e-mail to helpdesk@NIH.gov
- Web Request for Support: Submit to: http://support.cit.nih.gov

Provide the following information to help facilitate issue resolution:

- ✓ Oracle Responsibility Name
- ✓ What are you trying to accomplish.
- ✓ The title of the window in which you are located.
- ✓ A description of the problem that includes the exact error message you receive and where the error message is located
- A description of what steps you took prior to receiving the error, including the exact traveler name, invoice number, etc that you were trying to process
- ✓ What happens if you try to proceed
- ✓ The impact of the error on your work and when you need it to be resolved
- ✓ Who to contact in the event that you are not available.

Evaluation



